



ALFA International
THE GLOBAL LEGAL NETWORK

Managing Partner Webinar

February 17, 2026





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Feedback on AI Implementation



Key Takeaways of AI Data Received

- Responses: 22 Firms
- Size of Firms: 9 Between 20-40 Attorneys
 - 6 Between 20-28 Attorneys*
 - 4 Between 135-175 Attorneys

Key Takeaways of AI Data Received

Current

- Co-Counsel (8)
- Westlaw/Lexis (7)
- Co-Pilot (6)
- ChatGPT (3)
- NetDocs AI (2) (Document Management Add On)
- Centerbase AI (2) (Accounting/Billing Add On)

Key Takeaways of AI Data Received

Other Current

- Leap (Billing)
- Traced (Billing)
- Elite (Billing)
- Harvey (Practice Management)
- Everlaw (Document Management)
- Google Nano Banana Pro (Image Generator)
- Google Gemini (Google's AI Assistant)
- Grok (AI Assistant)

Key Takeaways of AI Data Received

Currently Testing

- Co-Pilot (5)
- ChatGPT (3)
- Lexis/Westlaw (2)
- Perplexity Pro (Tasks)
- Vincent (Practice Management)
- NetDocs AI (4)
- Co-Counsel (3)
- Laurel (2) (Time Entry)
- PointOne (Time Entry)
- Spellbook (Contract Review)



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Feedback from ALFAI Firms



Lewis Thomason – 120 attorneys

- Lexis AI/Protégé, Microsoft Co-Pilot & ND Max/Netdocs
- Key considerations
- How did you implement?
- How are you training?
- Lessons Learned

Young Moore and Henderson – 40 attorneys

- Vincent & Legora
- Key considerations
- How did you implement?
- How are you training?
- Lessons Learned

Ryan Smith & Carbine – 20 attorneys

- Laurel (Billing)
- Key considerations
- How did you implement?
- How are you training?
- Lessons Learned

Keating Muething & Klekamp – 145 attorneys

- Harvey
- Key considerations
- How did you implement?
- How are you training?
- Lessons Learned

Morrison Mahoney – 175 attorneys

- HireQuotient (HR)
- Key considerations
- How did you implement?
- How are you training?
- Lessons Learned

Best Practices from others on the call?



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BUILDING THE FUTURE: BUSINESS DEVELOPMENT & SUCCESSION PLANNING POWERED BY ALFAI

STRATEGIES FOR SUSTAINABLE GROWTH AND LEADERSHIP TRANSITION



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Welcome

Succession Planning: Securing Your Firm's Future

Succession planning ensures continuity for clients and firms during leadership transitions or retirements, securing long-term stability.

Global Network, Local Impact

Utilizing ALFA International's resources and network helps attorneys thrive beyond their tenure and supports firm sustainability.



Roadblocks to Succession Planning

- Cultural & Behavioral Roadblocks
 - Reluctance to let go of client control: “My clients, my book” mindset
 - Avoidance of difficult conversations
 - Lack of trust in successors
- Structural & Financial Roadblocks
 - Compensation systems that discourage transition
 - No financial incentives for mentorship or handoff
 - Unclear ownership of succession planning

Roadblocks to Succession Planning

- Talent & Pipeline Challenges
 - Underdeveloped business development skills in younger lawyers
 - Limited visibility of next-generation lawyers to clients
 - Burnout and attrition among mid-level lawyers
- Client-Related Roadblocks
 - Clients attached to particular lawyers
 - Lack of documented client knowledge

Roadblocks to Succession Planning

- Strategic & Planning Gaps
 - No formal timeline or roadmap
 - Overreliance on emergency succession
 - Failure to align succession with firm strategy
- Operational & Governance Issues
 - Leadership turnover or indecision
 - Lack of data and transparency

Why Business Development is Essential to Succession Planning

- Client relationships must outlive individual lawyers.
- Revenue continuity depends on intentional client transition.
- Next-generation lawyers must be visible to clients early.
- Succession is not an event—it's a process.
- Firms without Business Development pipelines risk “client cliffs.”
- Business Development develops future rainmakers, not just technicians.
- Cross-selling reduces dependency on any single lawyer.
- Clients expect continuity and depth.
- Succession planning strengthens firm valuation.
- Creates accountability and measurable transition goals.



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What Mayer has done

- Firm history
- Words to live by: “Nothing worth having is come by easily”
- ALFAI: Privilege vs. Perk
- Accountability to the firm
- Results driven

How ALFAI Can Help

- Future Leaders Practice Group
 - Best practices sharing
 - Grow their network
 - Feel valued by the firm
- Speaking Opportunities – Webinars, Regionals PG Seminars
- Writing Opportunities – Compendia, Coursebook
- Volunteer Opportunities – Editors, Sub-Chairs
- Choose the right people!



Steps to Identify and Prepare a Successor

Define Leadership Competencies

Identify required skills such as technical expertise, client management, and cultural fit for leadership roles.

Evaluate Potential Candidates

Assess candidates based on performance, leadership potential, and alignment with firm values.

Structured Development Plans

Provide mentorship, training, and client exposure to prepare successors effectively.

Communication and Transition

Inform clients about succession to ensure trust and facilitate gradual responsibility transfer.



Succession Planning Success Stories from those on the call?



Key Takeaways and Next Steps

Dual Focus Strategy

Successful legal practice growth requires balancing client acquisition with leadership succession planning.

Utilizing ALFAI Resources

Leveraging ALFA International's networking and best practice tools strengthens business and leadership development.

Actionable Next Steps

Create development plans, identify successors, and engage in firm conversations about long-term goals.

Commitment to Growth

Embrace continuous growth and succession planning as essential for sustaining legal practice success.



SWOT ANALYSIS



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ALFAI Attorney Feedback

- Please review the SWOT Analysis
- We need your feedback on the direction/focus of this group
- A survey will be sent shortly
- Further discussion at MP Meeting in Chicago – July 9-10

Purpose of the ALFAI MP Forum

- Foster Collaboration and Best Practice Sharing
- Strengthen Firm Relationships with ALFAI
- Enhance Leadership and Strategic Planning
- Facilitate Networking and Collaboration
- Encourage Succession Planning at Network Level and Within Member Firms

Strengths

- Engaged Leadership & Active Participation
- Relevant and Actionable Programming
- Willingness to Innovate
- Strong Networking, Collaboration & Trust

Weaknesses

- Limited Content for Smaller Firms
- Minimal International Engagement
- Participation Gap
- Varying Engagement on Digital Platforms

Opportunities

- Strategic Planning & Succession
- Technology & Innovation
- Enhanced Member Engagement
- Sponsorship & Partnerships
- ALFAI Brand Awareness
- Business Development Facilitation

Threats

- Meeting Fatigue & Oversaturation
- Competition for Attention
- Succession & Leadership Gaps